



# **Shaw Business**

Auto-Attendant User Guide

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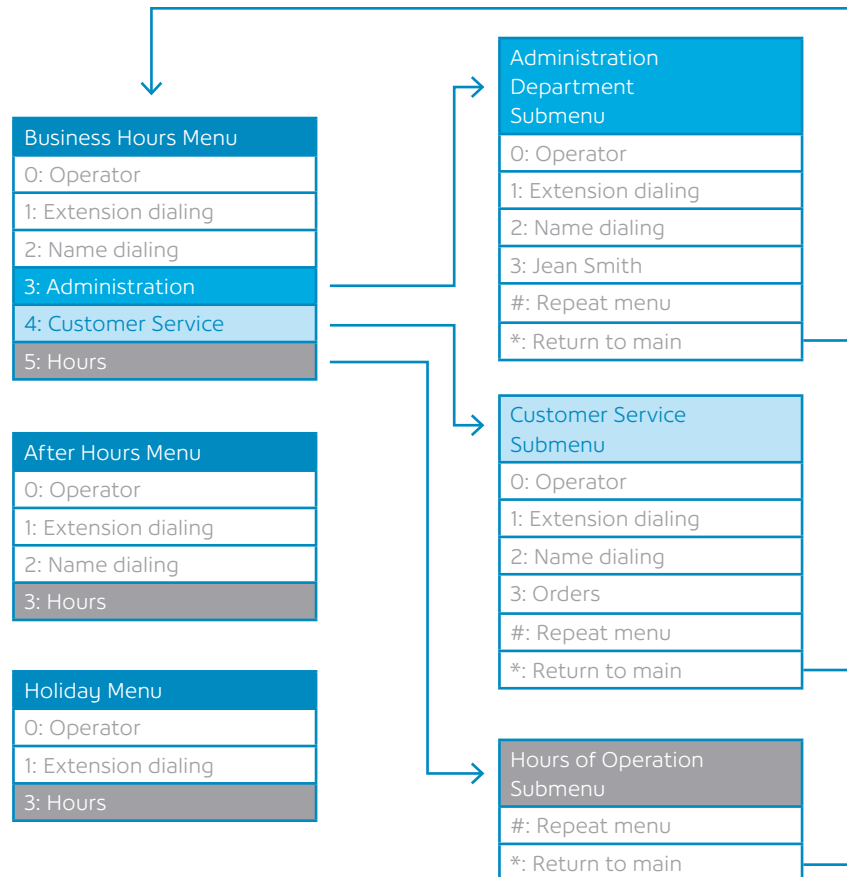
The Auto-Attendant serves as an automated receptionist that answers the phone call and provides a personalized message to callers. It can be configured to provide callers with the option to connect to the operator, dial by name or extension, leave a message, listen to a greeting, or connect to configurable destinations.

## Steps to setup an Auto-Attendant

- Plan your Auto-Attendant structure
- Prepare Custom Greetings for each Menu and Sub-menu
- Configure Time and Holiday Schedules for your organization
- Set up the Menus and Submenus
- Call the Auto Attendant numbers to test your design

# Plan your Auto-Attendant structure

Map out the structure of the Menus (Business Hours, After Hours and Holiday) and Submenus. Here is a sample Auto-Attendant structure:



## Notes

- Extension dialing can be enabled in each Menu and Submenu to allow the user to dial an extension without having to select an option first.
- There are controls for the scope of extension and name dialing to determine whether calls can be directed to users in the same group, department, or enterprise.

# Prepare custom greetings for each menu and sub-menu

Custom greetings that include each key defined in the menu are needed to be voiced to the caller. They can be recorded using the End User Portal web interface or pre-recorded in an audio file.

## Note:

If Custom greetings are not defined for each Menu and Submenu, the system will play default greetings that may not be related to the options in the Auto-attendant menus and submenus.

## Tips:

- List Menu options in a predictable order.
- List menu options that transfer to the operator last (To reach the operator, press 0 or stay on the line).

## Define custom greeting contents:

For the sample menu the following custom greetings will be required:

- Welcome to ABC Distributing.
- If you know the extension of the party you are trying to reach, dial it now.
- To use our automated name directory, press 2.
- To reach the Administration department, press 3.
- To reach Customer Service, press 4.
- For our regular Business Hours, press 5.
- To reach the operator, press 0, or stay on the line.

## After Hours Menu Greeting:

- "Welcome to ABC Distributing. Our offices are now closed.
- To reach an extension, dial 1.
- To use our automated name directory, press 2.
- For our regular business hours, press 3.
- Thank you for calling".

## Holiday Menu Greeting:

- "Welcome to ABC Distributing. Our offices are closed for holidays.
- To reach an extension, dial 1.
- For our regular business hours, press 3.
- Thank you for calling".

## Prepare custom greetings for each menu and sub-menu

### Administration Department Submenu Greeting:

- “You have reached the administration department of ABC Distributing.
- If you know the extension of the party you are trying to reach, dial it now.
- To use our automated name directory, press 2.
- To reach Jean Smith, press 3.
- To repeat this menu, press the pound key.
- To go back to the previous menu, press the star key.
- To reach the operator, press 0 or stay on the line”.

### Customer Service Submenu Greeting:

- “You have reached the customer service department of ABC Distributing.
- To dial an extension, press 1.
- To use our automated name directory, press 2
- To place an Order, press 3.
- To repeat this menu, press the pound key.
- To go back to the previous menu, press the star key.
- To reach an operator, press 0 or stay on the line.”

### Hours of Operation Submenu Greeting:

- “Our hours of operations are Monday to Friday from 9 AM to 4 PM
- To repeat this menu, press the pound key.
- To go back to the previous menu, press the star key.”

## Recording the custom greetings

### Providing Custom greetings for Menus and Submenus using the End User Portal web Interface

There are 2 ways to provide the Custom greetings for Menus and Submenus using End User Portal web Interface by login with the Group Administrator credentials:

- Pre-recording the greetings into audio files and uploading them into the menu or submenu

#### **Note: About Pre-recorded audio files:**

- Most common audio file extensions supported (wav, mp3, etc)
  - Audio recorded for less than 10 min 40 sec
  - Must be smaller than 16MB
- Recording the greetings using you PC microphone directly to the menu or submenu

Steps to Upload or Record the Custom greetings can be found in the section **SET UP THE MENUS AND SUBMENUS**

### Recording Custom greetings for the Business Hours, After Hours and Holiday menus by calling the Voice Portal

It is possible to record the Custom greetings for the Business Hours, After Hours and Holiday menus by calling the Voice Portal and login as the Group Voice Portal extension with the Voice Portal Administrator password.

#### **NOTE: Greetings for Submenus cannot be recorded through the Voice Portal.**

Steps to record the Menu greeting using the Voice Portal can be found in the section 4.6. RECORD CUSTOM GREETINGS FOR THE BUSINESS HOURS, AFTER HOURS AND HOLIDAY MENUS BY CALLING THE VOICE PORTAL (ALTERNATIVE TO THE WEB USER PORTAL)

# Configure time and holiday schedules for your organization

Configure a Time Schedule for your organization's Business Hours and a Holiday Schedule for your organization's holidays.

## Note:

- The Group administrator can manage the Group Schedules in the End User Portal web interface. If you do not have a Group administrator this section will be completed by Shaw on your behalf.

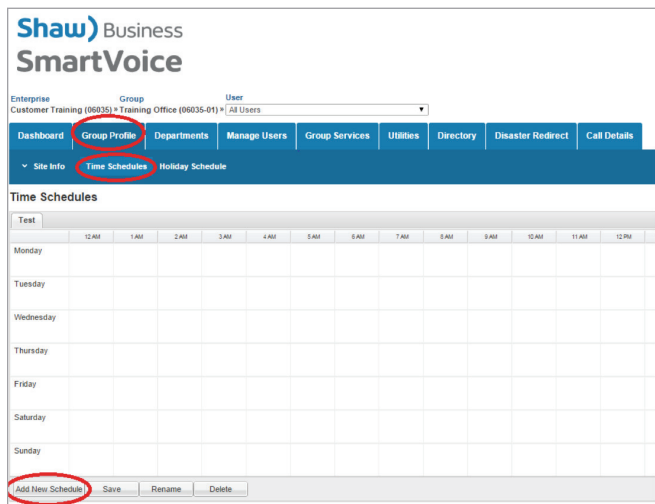
## Add the time schedule for business hours

The Group administrator user can perform this task in the End User Portal web interface:

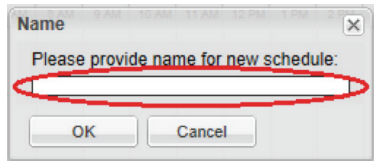
**Group Profile -> Time Schedules -> Add New Schedule**

(To edit select the tab of an existing Time schedule and go to section 2.1.3)

The Group – Time Schedule page:



1. Enter a name for the schedule in the text box of the Name window that appears:



2. Click OK. This creates a schedule with no events

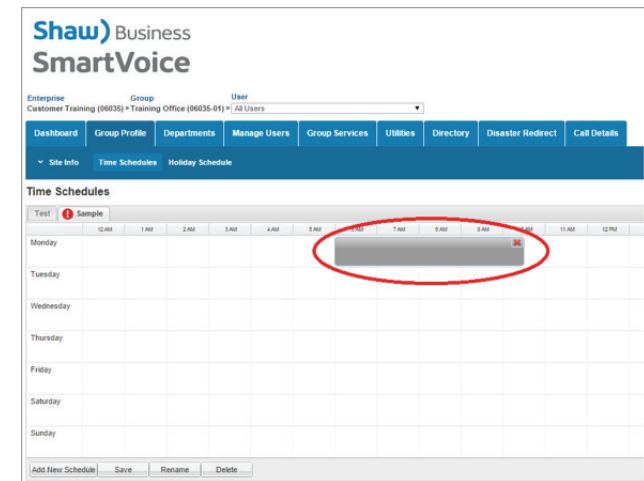
# Configure time and holiday schedules for your organization

3. Select the tab of the created (or existing) schedule to display the week calendar:

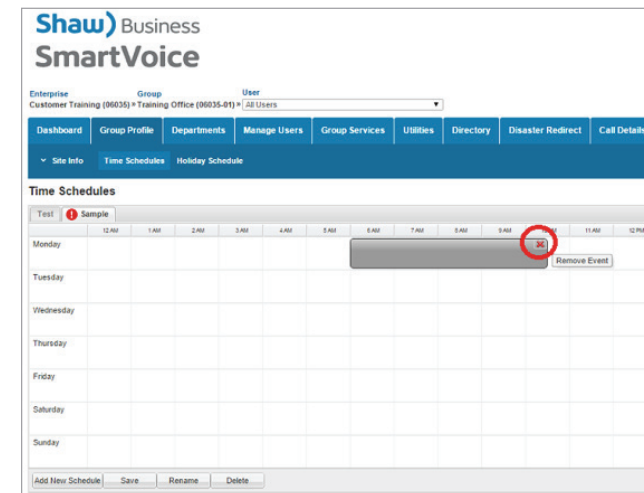
## Note:

An empty schedule, that is, a schedule with no events, is considered by the system as always applicable.

- To add an event, click and drag the mouse from the start time until the end time of the Business day for each weekday:



- To remove an event, click on the red X at the top right corner of the event box:



4. Click on Save to save the changes in the Time schedule

# Add the holiday schedule for the organization

The Group administrator user can perform this task in the End User Portal web interface:

**Group Profile -> Holiday Schedule -> Add Holiday Schedule**

(Or select Edit at an existing Holiday schedule and go to 2.2.2

The Group – Holiday Schedule page appears:

1. Click Add Holiday Schedule. The Add Holiday Schedule window appears
2. Enter the name for the Holiday schedule, the list of non-business days and click on Save:

# Set up the Menus and Sub Menus

## Note:

- The Group administrator can manage the Menus and Submenus in the End User Portal web interface. If you do not have a Group administrator this section will be completed by Shaw on your behalf.

The menus are configured in the End User Portal web Interface by the Group administrator user.

**Group Services -> Site Services -> Auto Attendant -> Select: <Select Auto Attendant> -> Profile**

## Configure the Auto-Attendant profile options

Select the options for the Auto-Attendant:

Field	Description
Scope of Extension Dialing	Specify whether extension dialing applies across the Enterprise, Group or Department of the Auto Attendant.
Scope of Name Dialing	Specify whether name dialing applies across the Enterprise, Group or Department of the Auto Attendant.
Name Dialing Entries	<p>Define how a caller should say the name of the person they want to reach.</p> <p>LastName + FirstName: The caller must first enter the last name of the person and then enter the first name.</p> <p>LastName + FirstName and FirstName + LastName: The caller can enter either the last name and then the first name of the person, or the first name and then the last name.</p>

## Configure the Sub Menus

The Submenus are used to build multilevel menus. In the End User Portal web Interface:

**Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Submenus**

Follow these steps to Add every Submenu needed for the Auto-Attendant.

(The Edit submenu screen has the same options available as the Add submenu and the same steps can be used to manage the submenu).

1. On the Auto-Attendant Submenu page, click Add:

2. The Auto-Attendant Submenu Add page appears

3. In the Submenu ID text box, enter a name for the Submenu.

4. In the Submenu Greeting section, select Personal Greeting and record or upload the Custom Greeting to be played when the caller selects the submenu:

- To Record a Custom Greeting using the PC microphone, select the microphone icon to open the Flash wave plug-in that allows to record, play and upload the Custom greeting:

- To Upload a Custom Greeting, click on Browse to locate the Pre-recorded file and then upload it:

5. Check or uncheck Enable extension dialing at any time. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first.

## Configure the Sub Menus

6. Specify menu options for callers. The required data applies for Submenus and Menu. For each option, provide the following data:

Field	Description
Key	A key on a telephone keypad to which you can assign an action.
Description	Description of the menu option.
Action	Select an action to be performed when the key is pressed by the caller.
Details	Appears for actions that require additional data, such as a phone number or submenu name

The Action control offers the following choices for Menu and Submenus:

Action	Explanation
Transfer With Prompt	This informs the caller that is being transferred and transfers the call to the phone number or extension provided in the Details column.
Transfer Without Prompt	This transfers the call to the phone number or extension provided in the Details column without playing any prompt to the caller.
Transfer To Operator	The caller is played a message informing them that they are being transferred to the operator and the call is transferred to the number in the Details column. All operator functions of the auto attendant will use this transfer path once this operator phone number is set.
Transfer To Submenu	The caller is transferred to the indicated submenu and played the greeting defined for that submenu.
Name Dialing	The caller is provided with access to name dialing and asked to enter the name of the party they are trying to reach using the phone keypad. The caller is played the name of the called party and is then transferred.
Extension Dialing	The caller is provided with access to extension dialing and asked to provide an extension. The caller is played the name of the called party provided and then is transferred.
Repeat Menu	The Menu or Submenu greeting is played to the caller.
Return to Previous Menu	The caller is transferred to the previous menu and the greeting for the previous menu is played. This option is only available in the Submenu selection.
Exit	The caller is thanked for calling and the call is released.
--	Indicates that no action has been selected. Menu greeting is played to the caller after an error message.

# Configure the Sub Menus

## Note:

- If an action that requires a phone number is selected, Phone numbers can include the Feature Access Code prefix to activate Direct Voice Mail Transfer (\*55) to transfer calls directly to the mailbox of a phone number or extension in the same group. For example \*55\*4035551234
- Callers who do not press any key in a Menu will be transferred to the operator. If no operator is configured, the call will be terminated.
- Callers who do not press any key in a Submenu after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.

7. Click Save:

Key	Description	Action	Details
0	Operator	Transfer To Operator	5871111111
1	Extension dialing	Extension Dialing	
2	Name dialing	Name Dialing	
3	Jean Smith	Transfer With Prompt	5872222222
4		---	
5		---	
6		---	
7		---	
8		---	
9		---	
*	Return to main	Return to Previous Menu	
#	Repeat menu	Repeat Menu	

Note: Callers who do not press any key after the greeting has been played three times will be forwarded to the operator. If no operator is configured, the call will be terminated.

Close Save

# Configure the Sub Menus

## Set business hours menu

Use the Business Hours tab to specify the dialing menu of prompts and actions to be used during business hours. In the End User Portal web Interface:

**Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> -> Profile -> Business Hours Tab**

1. Specify the Business Hours schedule. Select a Time Schedule for the Business Hours from the drop-down list. This value applies for both "Business Hours" and "After Hours" menus.
2. In the Business Hours Greeting section, select Personal Greeting and record or upload the Custom Greeting to be played during business hours:

- To Record a Custom Greeting using the PC microphone, select the microphone icon to open the Flash wave plug-in that allows to record, play and upload the Custom greeting:

- To Upload a Custom Greeting, click on Browse to locate the Pre-recorded file:

3. Check or uncheck Enable first-level extension dialing. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first. This feature is more convenient for callers who know the extension of the person they want to reach.

4. Specify menu options for callers. The same required data and available options for Submenus are applicable for menus. Please refer to the Submenu section for details: **Specify menu options for callers**



# Configure the Sub Menus

7. Click Save:

Business Hours: **TestTimeSchedule** This value applies for both "Business Hours" and "After Hours" tabs.

Business Hours Greeting

☐ Default Greeting

☒ Personal Greeting Rec-040215-1023-78.wav

Load personal greeting: C:\Users\Public\Music\Sa Browse...

Business Hours Dialing Menu

☒ Enable first-level extension dialing

Key Description	Action	Details
0 Operator	Transfer With Prompt	5873333333
1 Extension dialing	Extension Dialing	
2 Name dialing	Name Dialing	
3 Administration	Transfer To Submenu	Administration
4 Customer Service	Transfer To Submenu	Customer Service
5 Hours	Transfer To Submenu	Hours
6 Exit	Exit	
7	---	
8	---	
9	---	
* Repeat	Repeat Menu	
#	---	

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls: ☒ No Privacy ☐ Privacy For External Calls ☐ Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls: ☒ Never ☐ Internal Calls ☐ All Calls

Save

## Set after hours menu

Use the After Hours Menu tab to specify the dialing menu of prompts and actions to be used outside business hours. In the End User Portal web Interface:

**Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> Profile -> After Hours Tab**

1. Specify the Business Hours schedule. Select a Time Schedule for the Business Hours from the drop-down list. This value applies for both "Business Hours" and "After Hours" menus. The greeting and dialing menu defined in this menu apply outside business hours.

2. In the After Hours Greeting section, select Personal Greeting and record or upload the Custom Greeting to be played during business hours:

- To Record a Custom Greeting using the PC microphone, select the microphone icon to open the Flash wave plug-in that allows to record, play and upload the Custom greeting:

After Hours Greeting

☐ Default Greeting

☒ Personal Greeting

Load personal greeting: Browse...

00:00 [Microphone Icon] [Play Icon] [Upload Icon]

Upload

# Configure the Sub Menus

- To Upload a Custom Greeting, click on Browse to locate the Pre-recorded file:

After Hours Greeting

☐ Default Greeting

☒ Personal Greeting

Load personal greeting: C:\Users\Public\Music\Sa Browse...

3. Check or uncheck Enable first-level extension dialing. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first. This feature is more convenient for callers who know the extension of the person they want to reach.

4. Specify menu options for callers. The same required data and available options for Submenus are applicable for menus. Please refer to the Submenu section for details: **Specify menu options for callers**

5. Click Save:

Business Hours: **TestTimeSchedule** This value applies for both "Business Hours" and "After Hours" tabs.

After Hours Greeting

☐ Default Greeting

☒ Personal Greeting Rec-110214-1604-40.wav

Load personal greeting: C:\Users\Public\Music\Sa Browse...

After Hours Dialing Menu

☐ Enable first-level extension dialing

Key Description	Action	Details
0 Operator	Transfer To Operator	5874444444
1 Extension dialing	Extension Dialing	
2 Name dialing	Name Dialing	
3 Hours	Transfer To Submenu	Hours
4 Exit	Exit	
5	---	
6	---	
7	---	
8	---	
9	---	
* Repeat	Repeat Menu	
#	---	

Call Policies

View or modify Call Policies for the User

Connected Line Identification Privacy on Redirected Calls: ☒ No Privacy ☐ Privacy For External Calls ☐ Privacy For All Calls

Send Call Being Forwarded Response on Redirected Calls: ☒ Never ☐ Internal Calls ☐ All Calls

Save

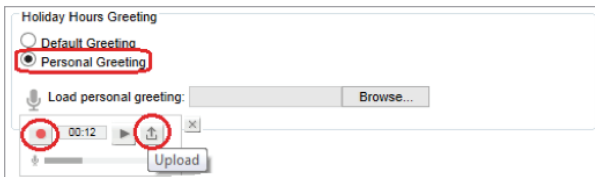
# Configure the Sub Menus

## Set holiday menu

Use the After Hours Menu tab to specify the dialing menu of prompts and actions to be used during holidays. In the End User Portal web Interface:

**Group Services -> Site Services -> Auto Attendant -> Select: <Select an Auto Attendant> Profile -> After Hours Tab**

1. Specify the Holiday schedule. Select a Holiday Schedule from the drop-down list. The greeting and dialing menu defined in this menu apply during these holidays.
2. In the Holiday Hours Greeting section, select Personal Greeting and record or upload the Custom Greeting to be played during holidays:
  - To Record a Custom Greeting using the PC microphone, select the microphone icon to open the Flash wave plug-in that allows to record, play and upload the Custom greeting:



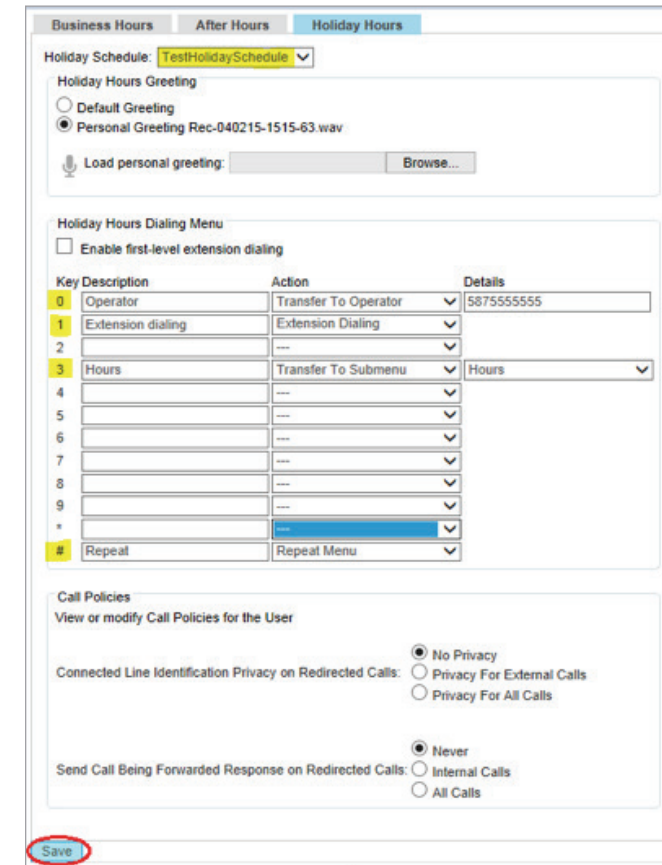
- To Upload a Custom Greeting, click on Browse to locate the Pre-recorded file:



3. Check or uncheck Enable first-level extension dialing. This feature allows the caller to interrupt the greeting and dial an extension without having to select an option first. This feature is more convenient for callers who know the extension of the person they want to reach.
4. Specify menu options for callers. The same required data and available options for Submenus are applicable for menus. Please refer to the Submenu section for details: **Specify menu options for callers**

# Configure the Sub Menus

5. Click Save:



Key Description	Action	Details
0 Operator	Transfer To Operator	5875555555
1 Extension dialing	Extension Dialing	
2	---	
3 Hours	Transfer To Submenu	Hours
4	---	
5	---	
6	---	
7	---	
8	---	
9	---	
*	---	
# Repeat	Repeat Menu	

# Record custom greetings

Follow these steps to record Custom greetings for the Business Hours, After Hours and Holiday menus of any Auto Attendant in your group by calling the Voice Portal:

## Note:

To use this method the Group Voice Portal extension and the Group Voice Portal Administrator password are needed

1. Log in to the Voice Portal as the administrator from any phone:

- Access the voice portal from a phone within your group, dial the Group voice portal extension or \*98
- At the login prompt for a passcode or star key (\*), press \*.
- Enter the Group Voice Portal extension followed by the pound key (#).
- Enter the Voice Portal Administrator password followed by the pound key (#).

2. The Group voice portal announces the Administrator main menu:

- To change an Auto Attendant's greetings, press 1.
- To go to the Branding Configuration menu, press 2.
- To change your passcode, press 8. (Administrator password)
- To exit the voice portal, press 9.
- To repeat this menu, press the pound key (#)

3. Press 1 to change an Auto Attendant's greetings

4. Enter the extension for the auto attendant, followed by the pound key (#). Only if there is more than one Auto-attendant in the group

5. Follow the prompts to change any of the Business Hours, After Hours or Holiday greetings:

- To change the Business Hours greeting, press 1.
- To change the After Hours greeting, press 2.
- To change the Holiday greeting, press 3.



**For customer care and technical support**

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